

Luxury Hospitality Linen— The Bed Wars

Spas are the new front in the competitive battle over high-end linens

By Matt Alexander



The marketing of luxury bedding by major hotel companies—known as the Bed Wars—has had the most

dramatic impact on laundries that service the hotel industry of any event we’ve observed in our 35 years of laundry consulting. The result is that the pounds processed per occupied room, the cost of textile replacement on a cost-per-pound or occupied-room basis and overall laundry costs have increased significantly. The upshot of all this is that the boom in luxury bedding is fueling substantial growth opportunities for laundry services.

Opening salvo

The origin of this trend in luxury hotel bedding is generally attributed to Westin with their 1999 PR and marketing campaign for the “Heavenly Bed.” Amazingly, this dramatic shift to luxury hotel bedding didn’t stem from customer demand. “Today’s new beds are a result of a call for attention,”¹ says Sue A. Brush, who was Westin’s senior vice president of marketing at the time of the Heavenly Bed campaign. “We wanted to differentiate ourselves from the competition. It wasn’t anything that came through research.”

The initial campaign was unique and experiential. It generated tremendous enthusiasm ... the rest is history.

The luxury bed

The foundation for the use of luxury linen for bedding starts with a great mattress which may include features such as feather toppers, 900 coils, adjustable firmness and plush mattress pads. Add cotton-




rich, 250+ thread-count sheets, down comforters, duvet covers, pillow shams and a whole lot of pillows. Make it all white and you have the luxury bed.

Although Westin was the first to publicize their branded bed, it wasn’t long before other major hotel companies joined in. Currently, virtually all of the major hotel chains have announced plans to upgrade their beds. The investment in textiles, equipment, facilities, training, utilities, processing, housekeeping and distribution labor is tremendous.

For example, Radisson, Holiday Inn and Marriott are reported to have spent approximately \$263 million on new bedding. Hilton spent a whopping \$1 billion! Fortunately, the capital cost comes at a time when the hotel industry is booming.

Hotel Chain	Investment Costs
Radisson ²	\$20 million
Holiday Inn Express ³	\$53 million
Marriott ³	\$190 million
Hilton ⁴	\$1 billion

When comparing bedding packages from Westin, Hilton and Marriott, all are luxurious and represent state-of-the-art hotel bedding. Each of the branded beds offers a high level of luxury. Though Westin was the first to really promote a luxury bed, now there can be no doubt that a luxury bed is an integral part of a full-service hotel room. ☞

Westin	Hilton	Marriott
 <p>Pillow top mattress with 900 individual coils, 13.5 inches</p>	 <p>Plush top, extra coil, patented quilt design by Serta</p>	 <p>Plush feather mattress topper</p>
<p>Three sheets ranging in thread count from 180-250</p>	<p>250-thread-count sheets 60% cotton 40% polyester</p>	<p>300-thread-count sheets 60% cotton 40% polyester</p>
<p>Duvet with polyester stuffed insert</p>	<p>Mid-weight, allergy-free comforter</p>	<p>Duvet with down comforter</p>
<p>2 feather and down pillows 2 hypoallergenic pillows 1 boudoir pillow</p>	<p>Feather surrounded by allergen-free goose down</p>	<p>Six down pillows and a bolster</p>
<p>A down blanket</p>	<p>Polyester filled mattress topper</p>	<p>Feathered mattress topper</p>

It would be hard to make a case for one bed being significantly better than another, although there are advantages and disadvantages among the alternatives. For example, the fitted sheets that Marriott uses are more difficult to process to a high-quality finish than flat sheets; however, they are easier for guest-room attendants to use when making up the beds.

While most hotel experts concede that the Bedding Wars are over—that is to say, the large hotel chains that believed they could benefit from upgrading their bedding have done so, some boutique hotels may still be moving toward higher-end products. For example, Paul Paulin, president of Aqua Hotels and Resorts, said “When it comes to national brands, the Bed Wars might be over—but they’re just beginning for boutique and off-brand properties.”⁵ Upgraded beds are also moving to budget hotels like Hampton Inns.

The impact of Bed Wars

The Bed Wars have resulted in a significant increase in the amount of pounds processed per occupied room, as well as the need for more specialized processing of textiles.

Along with increased costs are the need for greater expertise, improved technology and the need to apply effective and informed management in the purchasing, inventory, maintenance and distribution of textiles. The increased cost of replacement and processing requirements of luxury textiles has created the need to increase training, education and supervision of all departments affected by

laundry.

The changes in hotel bedding requirements have had a titanic impact across virtually all elements of hotel operations and supply chains. This is particularly true for laundry processors. This trend is putting a severe strain on the capabilities of laundries, housekeeping departments, purchasing agents and commercial and hotel laundry managers. They are stressed to the max. The need in hotels for new systems, training, equipment and technology is now more demanding than at any time we can remember.

Among the departments affected in hotels are:

Purchasing

- Learn new textile standards to ensure the quality of linens purchased.
- Identify new vendors with:
 - Experience in handling luxury linens
 - Effective processing capabilities
 - A first-class quality-assurance program
 - 7 day-a-week operation
 - Written procedures and standards that are specific for the handling and processing of luxury linens

Housekeeping

- Shortage of space for textiles ☞

Textile Management

- Increased workload due to more frequent bed changing
- White bedding increased, rejection rate resulting in more inspection time
- Extra deep and oversized mattresses are heavier to lift for tucking sheets.
- Duvet covers can be time consuming.
- Shortages from overwhelmed laundry facilities result in delays and complications.

Financial and general management

- Greater costs for laundry processing and linen replacement impact the bottom line
- More need to understand laundry operations and/or suppliers
- More interaction with the unions as new standards are introduced

Engineering

- Constant need to keep equipment up and running to handle new production requirements
- Preventive maintenance schedules interrupted or postponed due to extended hours
- New machinery requires training and education.
- Existing machinery requires increased care, including de-burring rough edges, cleaning and adjustments.

Laundry and/or laundry supply company

- Train staff
- Implement and supervise improved QA programs.
- Develop standards and best practices for processing luxury products.
- Implement and maintain effective inventory management systems.
- Refine wash processes—including water levels, chemical concentrations, cylinder speeds, and temperature and process time.
- Plan laundry expansion
- Ongoing and robust linen inventory procedures
- Educate hotel management about luxury linens.
- Dedicate resources for inspecting and handling linens.
- Secure appropriate storage for new, soiled and clean textiles.
- Maintain appropriate par levels

Food and beverage

- Increased inventory management
- Oversight of textile preservation programs to reduce abuse of textiles
- More selection as a result of market forces

High-end linen opportunities

These new demands are creating fresh opportunities for those who

can provide solutions to the challenges associated with luxury linens—be they suppliers or laundry professionals. The advent of luxury linen in the hotel industry has spawned enormous business openings for laundry managers and commercial laundry companies that understand the hotel industry and how to service it.

For example, consider the increase in pounds processed per occupied room due to heavier towels and bedding. Before the Bed Wars, full-service hotels commonly used a bath towel that weighed between 10-14 lbs. per dozen. Today, bath towels commonly range from 14-20 lbs. per dozen. Similarly, deep-pocket mattresses and California king-sized mattresses require larger sheets, which weigh more than what they replaced. Duvet covers are washed and finished after each stay or every night as opposed to the relatively infrequent washing of blankets prior to the use of Duvet covers. Pillow shams again add more weight. Some of our world-class resort clients are currently consuming between 40-50 lbs. of textiles per occupied room.

The need to process significantly more pounds has coincided with the growing demand for more specialized handling of delicate—and expensive—luxury linens. These practices include enhanced quality control, refined washing and finishing techniques and procedures, and improvements in inventory, distribution and packaging.

Many mid-service hotels that traditionally didn't iron flatwork now must do so; and some that previously have ironed their flatwork are finding that they need larger ironers. The result is that hotels must invest in improved laundry systems, or outsource the work.

In our view, the majority of commercial and hotel laundries haven't completed the improvements to facilities, equipment, training and systems necessary to cost effectively process luxury linens to the high-quality standards required. Even the largest hotel laundries are only now getting the systems and procedures in place at their largest facilities.

As a result of the Bed Wars, we have seen an increased demand for laundry consulting for commercial-laundry companies and hotel companies in the following areas:

- Designing expanded facilities and production capability
- Adding flatwork-finishing systems—including spreader-feeders, ironers, folder/cross folders and stackers with a working capacity that's at least 130 inches wide.
- Install or activate Inventory Management Systems and Garment Distribution Systems
- Increase distribution capabilities for greater tonnage
- Develop enhanced standards, best practices and procedures manuals
- Adjust washer cylinder speeds, water levels, chemical concentrations, temperatures and process times to achieve high quality with reduced mechanical damage and chemical degradation.
- Financial analysis of the impact of luxury linen
- Selection of luxury linens
- Logistics planning
- Trouble shooting textile damage ☞

■ Textile laboratory testing and analysis

As the work in the hospitality industry gets increasingly complicated and the costs skyrocket, anyone who can step into the gaps created by this shift to luxury linens should find substantial rewards.

The winners

The winners in the Bed Wars include:

- The customer—customers enjoy a better night's rest and the comfort of luxury bedding.
- Hotel companies who realize increased room revenue
- Commercial laundries that provide quality processing and excellent customer service
- Laundry managers with effective experience, training and problem-solving skills
- Hotel managers who understand laundry and textile best practices, recognize the tremendous financial implications, and can apply these talents to the benefit of their properties.
- Laundry suppliers who educate and partner with hotels
- Technology, chemical and equipment suppliers who innovate better machinery, systems and processes
- Textile suppliers who educate hotel customers regarding reasonable expectations and how to effectively plan for a bedding upgrade



With all the challenges and opportunities out there, TRSA's Luxury Linen Seminar scheduled in conjunction with the Joint Committee Annual Meeting (JCAM) in Chicago on Aug. 9, couldn't come at a better time. By assembling some of the most successful laundry industry professionals in the business for the Luxury Linen Seminar, and by focusing its efforts on addressing this market need in *Textile Rental* magazine and other association forums, TRSA, in our opinion, is making the most significant contribution to education regarding the requirements for processing and presenting luxury linens since the outbreak of the Bed Wars.

The future—Spa Wars

Just when hotel and laundry companies were getting their arms around the new demands on laundry and housekeeping from the Bed Wars, the hotel industry is now becoming fully engaged in the "Spa Wars." In recent years, we've seen a substantial impact on laundry operations created by spas.

With the Spa Wars now looming as the next big marketing battle in the hotel industry, laundry and hotel industry professionals should anticipate the continued growth of the hotel laundry marketplace. They also can expect a continued need for improved laundry

management and effective planning. TRSA's focus on the needs of the hotel industry means that the most capable organization in the world to further laundry education and training understands the needs of the hotel industry and is providing meaningful help.

This is all good for laundry industry professionals and travelers who enjoy a luxury bed. However, the ultimate winner of the Bed Wars are the hotel companies that can command a higher rate for a room that offers a better night's sleep. Therefore, the Bed Wars seem to have had few losers and many winners. The jury's still out on whether the increased quality and production demands of luxury linens will encourage more hotel companies to build and operate laundries, or outsource the work to textile service companies. This dynamic is playing out right now in major markets worldwide.

Just as the Bed Wars have created many winners, TRSA's commitment to addressing the interests of the hotel industry through education, training and government affairs will result in a marketplace where all suppliers and customers are better informed. That's important because everyone needs the best preparation available to take advantage of the avalanche of laundry generated by the Bed Wars. Then again, we also must confront the laundry landslide that the Spa Wars are likely to produce.

What all this means for laundry industry professionals is that now is the time to make hay while the sun shines. Hotel occupancy is up, and the quantity of textiles consumed per room is at an all-time high, and rising. As you read these words, enterprising laundry operators worldwide are making their fortunes by addressing the challenges associated with high-end hospitality linens. With hard work, planning and follow-through, you too could be a victor in the Bed—and Spa—Wars.

References

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